



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address <i>Teachers Retirement System Accounting and Membership Division Suite 400 - Two Northside 75 Atlanta, GA 30381</i>	Application Number 81-682	
Application Number 3		Date Received DEC 11 1981	Date Completed DEC 21 1981
2. Person to Contact <i>Bob Hasser</i>		Working Title <i>Systems Manager</i>	
		Telephone Number <i>656-2954</i>	
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest <i>1945</i> Latest <i>to date</i>		5. Records Series Title (followed by title used in office, if different) <i>Report</i> <i>MONTHLY CONTRIBUTIONS FILE (COM)</i>	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? <i>The Teachers Retirement System administers the retirement system for all teachers and administrative personnel as defined in Georgia Code 32-2901; and performs accounting and investment services, through contract, for the Georgia State Employees Retirement System.</i> <i>The Systems Division enrolls members of the Employees and Teachers Retirement System; maintains member accounts; edits and processes monthly reports on member and employer contributions; and maintains subsidiary accounting records for the Georgia State Employees Retirement System and the Teachers Retirement System.</i>			
7. Record Series Description		This file contains the following documents (include form numbers and titles, if any): Attach samples of the file.	
Documents relating to:		<i>verifying information posted to member records based on quarterly and monthly school system reports.</i>	
Included are:		<i>computer output microfilm showing member and contributions posted.</i>	
File is arranged:		<i>chronologically by fiscal year; thereunder monthly; thereunder either numerically by system number sequence and alpha by member name and/or numerically by member number sequence.</i>	
8. Monthly Reference Rate		How often are records referred to which are: One to six months old <u>12</u> ; Seven to twelve months old <u>14</u> ; Thirteen to twenty-four months old <u>17</u> ; twenty-five months and older <u>10</u> ?	
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) <u>47 fiche-1" per yr.</u>			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
X		g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy. <i>contributing member annual summary file.</i>
X		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? <i>paper copy sent to system (reporting agency)</i>
X		i. Is this series (or a major portion of it) regularly microfilmed?
X		j. Does the record series result in a computer printout? <i>see h. above</i>

11. Retention Requirements

The following requires the series to be kept:

a. State Law	<u>-0-</u> years.	d. Audit period	<u>-0-</u> years.
b. Statute of limitation	<u>-0-</u> years.	e. Administrative need	<u>100</u> years.
c. Federal law	<u>-0-</u> years.	f. Federal retention instructions	<u>-0-</u> years.

Attach copy or excerpt of laws or regulations. Explain administrative need.

Needed for life of member and/or lifetime of beneficiary.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

FY78 - to date

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☒ Other (Specify) *and post to data base and then produce COM*

Master COM: transfer to State Records Center, hold 100 years; then destroy.

Duplicates: hold in current files area until no longer needed for reference, then destroy.

Computer Tape: after producing COM return to data center, hold 30 days, then destroy.

These instructions apply to all prior and future accumulations of the series. 1945 to 1977: Microfilm paper copies and process microfilm as above; destroy paper copy verifying microfilm.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>Bruce L. Gilbert</i>	<i>12/9/81</i>	<i>Joel Hubbard</i>	<i>12-9-81</i>
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		<i>[Signature]</i>	<i>12-18-81</i>
		Secretary of State/Designee	<i>12-14-81</i>
		Attorney General/Designee	<i>12-16-81</i>